Hertfordshire's Secure File Exchange Portal

User Guide V2.04

(Jan 2014)

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1. About HertSFX

HertSFX is Hertfordshire's web-based Secure File Exchange portal that enables you to send and receive files securely with third parties irrespective of any other electronic communication tools they use.

Using HertSFX does not require any more than standard internet access. It does NOT install anything nor does it change anything on your computer.

HertSFX is a simple file exchange system that enables you to securely transfer files to other users via an internet browser. The system requires a user to register using an email address. This email address is then used to notify the user they have file(s) awaiting collection.

HertSFX works on the similar principles of popular file exchange and sharing sites on the web BUT within a secure controlled environment.

This guide will show you how to set up your own HertSFX account and get you started using this Secure File Exchange system.

2. HertSFX Limitations

Whilst HertSFX uses your email system to send alerts about secure files ready for collection, HertSFX is neither an email system nor does it integrates with any email system. It is also NOT a file Storage System. All files sent are automatically deleted within 14 calendar days without exception.

Some government departments will insist on using GC Mail for secure file transfer. Please use GC Mail.

Other organisations may insist on either using their own secure mail system. Where these 3rd party systems do not install any software on our machines you may use these 3rd party secure mail systems to communicate with that party.

3. Getting Started

HertSFX is a fully self-serviced browser based secure web site purely for transmitting files from you to your clients. You begin by browsing to the secure website and completing a one off registration process. Once your registration is verified you may then use the system to exchange files with your business contacts. The system will send email notifications to the recipient with a link enabling the recipient to register. Once the user has registered the portal can be used to securely transfer files between you and any number of clients you deal with.

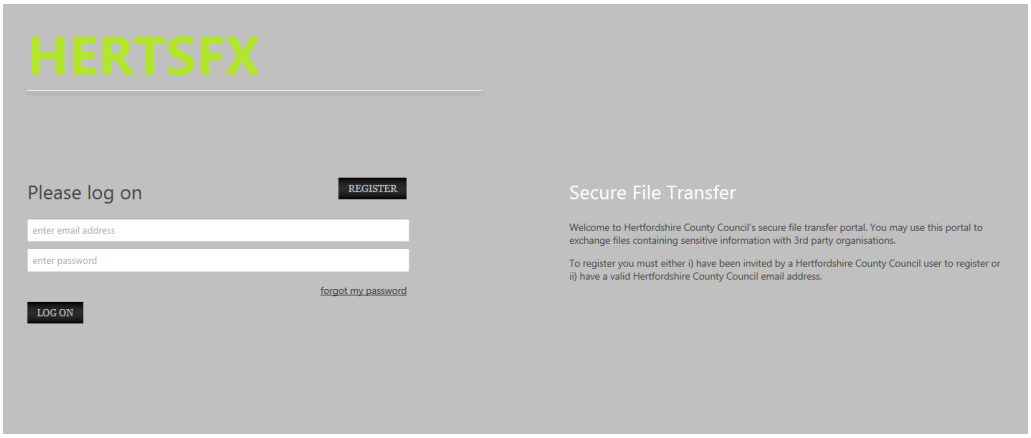
4. Registration

To start using the system you need to complete a simple one off registration process on the secure portal. This allows us to

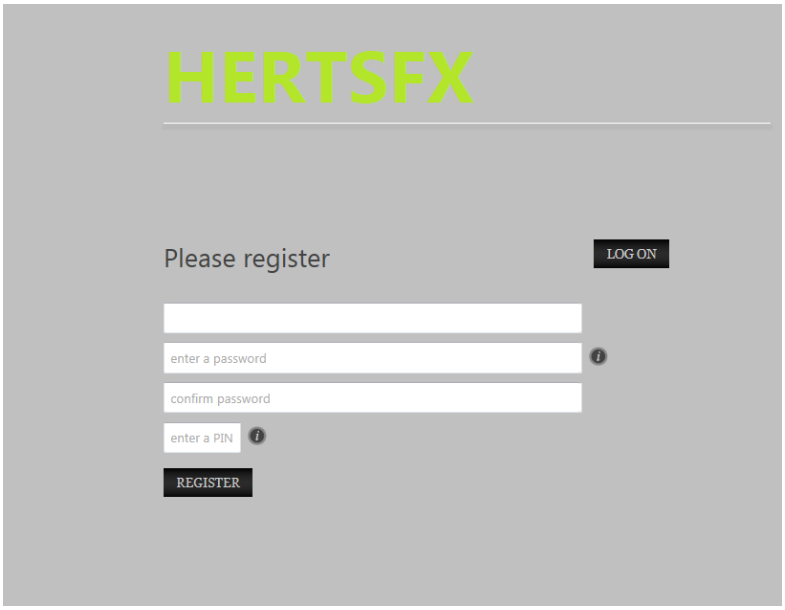
i) ensure that only authorised people can use the system
ii) setup your password/PIN to identify you when you use the system and
iii) Verify that email address you are using is under your control.

In order to register you must visit the secure portal's home page at https://hertsfx.hertscc.gov.uk

A. Browse to Portals Home Page


HERTSFX
Please log on
REGISTER
enter email address
enter password
forgot my password
LOG ON
Secure File Transfer
Welcome to Hertfordshire County Council's secure file transfer portal. You may use this portal to exchange files containing sensitive information with 3rd party organisations.
To register you must either i) have been invited by a Hertfordshire County Council user to register or ii) have a valid Hertfordshire County Council email address.

B. Click on Register



Enter your HCC email address ending h**ertfordshire.gov.uk**

Enter you chosen password and confirm by entering again.

Enter your chosen 4 digit pin.

(For rules password use and rules please refer password and pin explanation section below)

1.1. Password & Pin Requirements

Your chosen password identifies you to the secure portal and as such you are required to choose a password that is unique to you and cannot be easily guessed. To comply with the minimum security standards whilst providing sufficient protection your password must be at least 10 characters long containing at least 1 Upper Case character, 1 Lower Case character and 1 number.

At registration you must enter a 4 digit Personal Identification Number (PIN) of your choice. It is very important you remember this PIN. It will only be used in the event that you forget your password. If you forget this PIN the system will not allow you to reset your password.

1.2. Verification of Email

Once you have entered your registration details the system will require you to verify you email address. It does this by sending you an email to the email address you have supplied. The email contains a link that verifies that you and only you have control of the email address you supplied. Clicking on this link completes the registration. You will be automatically re-directed to the HertSFX logon screen. You may now login and use the system.

5. LOGIN

Each time you wish to use HertSFX you must log-on using your registered email address and your chosen password. You have 5 attempts to enter your password correctly before you are 'locked out' of the system.

6. FORGOTTEN YOUR PASSWORD?

If you do forget your password you can reset it by clicking the link 'forgot my password' on the login page. The link will re-direct you to the 'Forgotten Password' page. Enter your email address and the 4 digit PIN number you chose at registration. If you correctly enter your PIN you will be sent a reset link to your registered email. Click the link and follow the instructions on screen to reset your password.

If you do not correctly enter your PIN you will receive an email to your registered address to inform you of this and to ask you to try resetting your password again.

You will have 3 attempts to enter your pin correctly. After 3 attempts the account is permanently locked out and cannot be recovered, you will be informed of this via email. The account can be deleted. Once account is deleted you can re-register to use the system.

7. Account Deletion request?

To request deletion of an account, email the system administrator from the registered email address. At a minimum your email must consist of following items.

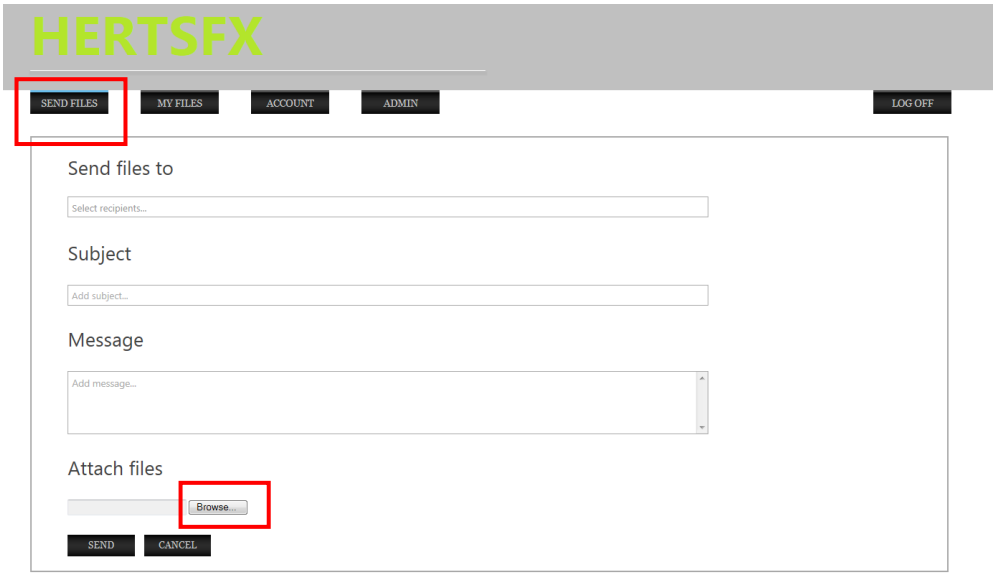
In the Subject Line: the words "[DELETE REQUEST]"

In the Body Text: Please delete my HertSFX account and I'd like to be notified on the following phone number ……102345678910.

A system administrator will call you to verify your request and upon verification delete your account. Once the account is deleted you may re-register. Note, once an account is deleted, all files and associated data with the deleted account are no longer accessible. However an audit trail of the account activity is kept for 6 calendar months.

8. Uploading/Downloading Documents

1.1. Uploading documents



To upload documents you select the SEND FILES tab on the main screen, the screen below will then load.

Enter the email address of the recipient in the box below the heading Send Files to.

If you are sending a file to someone new, you need to ensure you click on Add Recipient before you press enter otherwise the name will not get added to the Send Files To box

If you are sending a file to someone you have previously sent a file to then that contact name will appear in the list which appears when you click in the box. You then simply choose the name from the dropdown list of user you have sent previously.

Please Note – You MUST make sure that you have chosen the correct email address to send the file. The sender will be held accountable for any documents sent to the wrong people.

The Subject Box is optional – you may leave it blank or enter a one line short description.

The Message Box is to provide you an opportunity to describe what you are trying to send to your contact. You are allowed up to 1000 characters including spaces to describe what you are attaching.

The Attach File Box allows you browse your computer to locate the file(s) you want to attach. Click the browse button and select the document you wish to upload. In version 1.x or this portal you may you attach as many items as you like but you have to do this one at a time.

It is recommended that if you have more than a few files to upload, you should consider putting them in a Windows 'compressed folder' first. Microsoft Windows allows you to put as many files as you wish into a compressed folder which appears to HertSFX as a single file. You then attach this compressed folder to HertSFX.

Once the documents have uploaded you can click the 'Send It' button to send the file. It may take a couple of moments to upload and send the file depending on file size.

You will receive a sent confirmation message and summary of the file details.

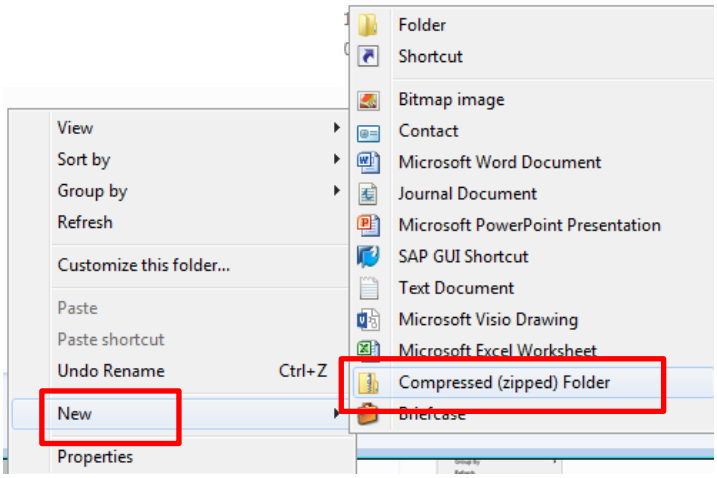
File sent ✔

Date:	13.05.2013
Time:	16:44
To:	michelle.swann@hertfordshire.gov.uk
Subject:	Privte and confidential
Message:	Please find the attached document
Files attached:	

Confidential document.doc	24 KB	last downloaded: never

1.2.Sending Zip Files

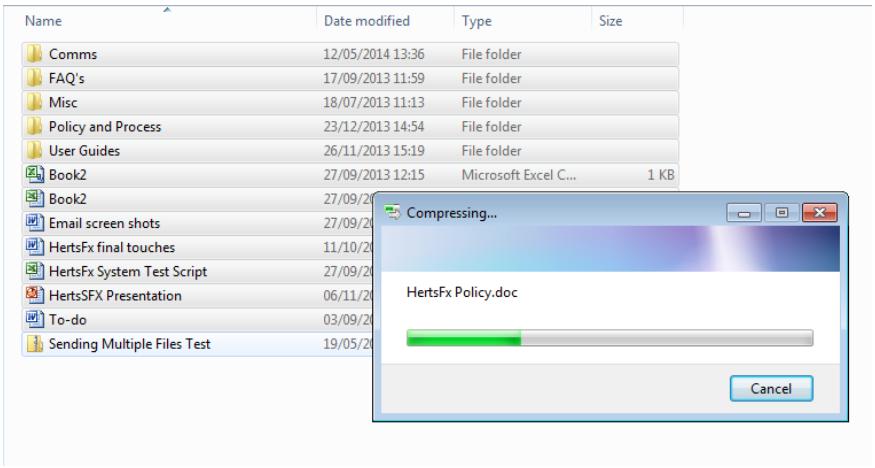
HertSFX can also be used to send larger zipped files. In order to send zipped files you must first create the zip file which contains all the files you wish to send. For more information on how to create a zip file follow the instructions below;



Right click in the space where you want the folder to sit.

Select new > Compresses (zipped) Folder

Rename your zipped folder



Drag the files that you wish to send in the newly created zipped folder. These will then be compressed and are ready to send.

Once you have created this folder you are able to upload the folder into HertSFX and send as usual.

1.3. Wrongly Sent Documents

Each user of HertSFX is responsible for the content of the documents they send and also who they send these documents to. In the event of sending documents to the wrong recipient HCC cannot be held accountable.

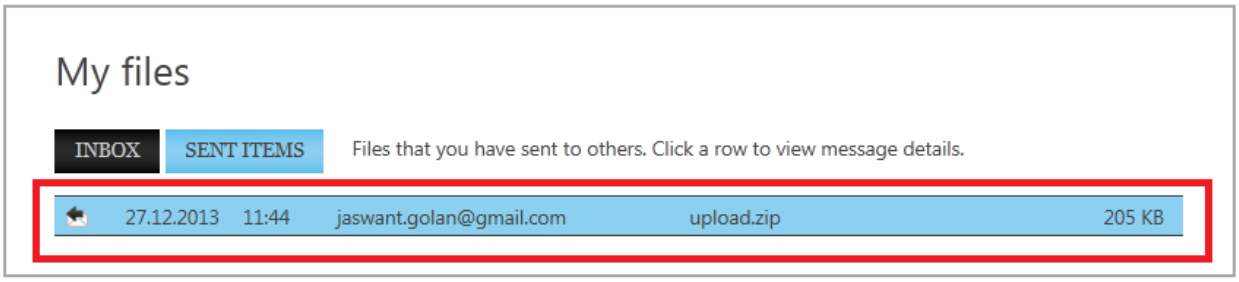
If you do send a file incorrectly, you are able to revoke the file as long as the recipient has not downloaded it yet. If the recipient has already downloaded the attachment then the only effective message revocation is to prevent further downloads.

1.4. Revoking Sent Files

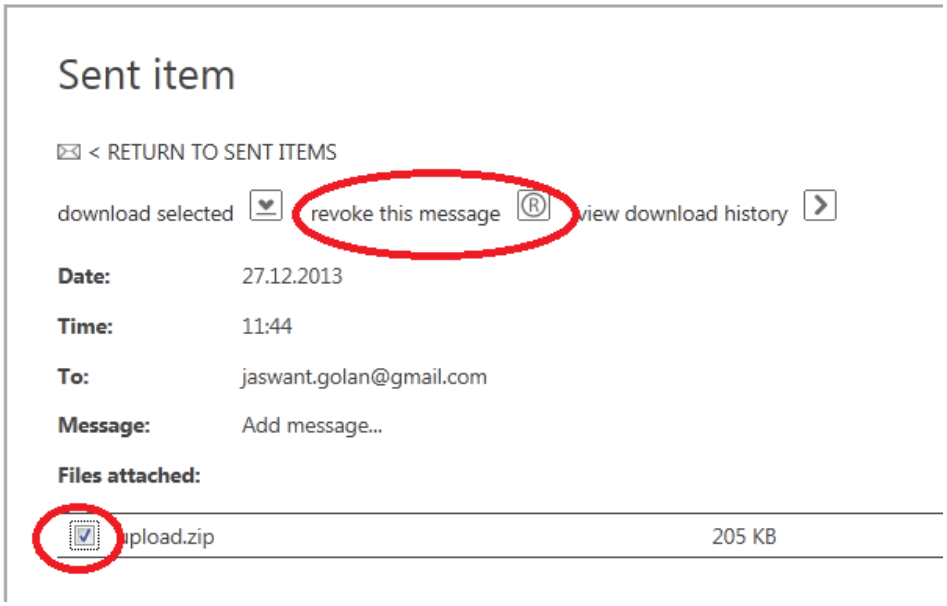
Even after you have uploaded a file, you can prevent the file from being viewed or downloaded. This is called message revocation.

To revoke a send file follow the procedure below.

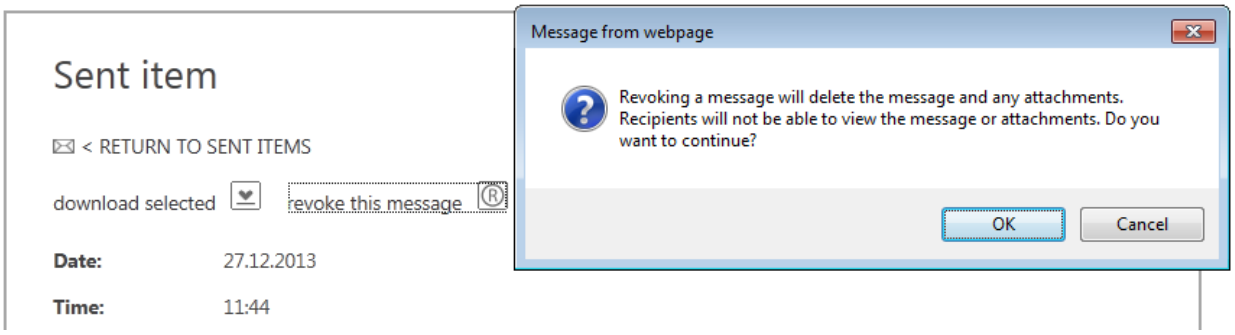
Go to your sent folder select the message / file upload. The Selected message will appear highlighted in blue as in picture below.


My files
INBOX
SENT ITEMS
Files that you have sent to others. Click a row to view message details.
27.12.2013 11:44 jaswant.golan@gmail.com upload.zip 205 KB

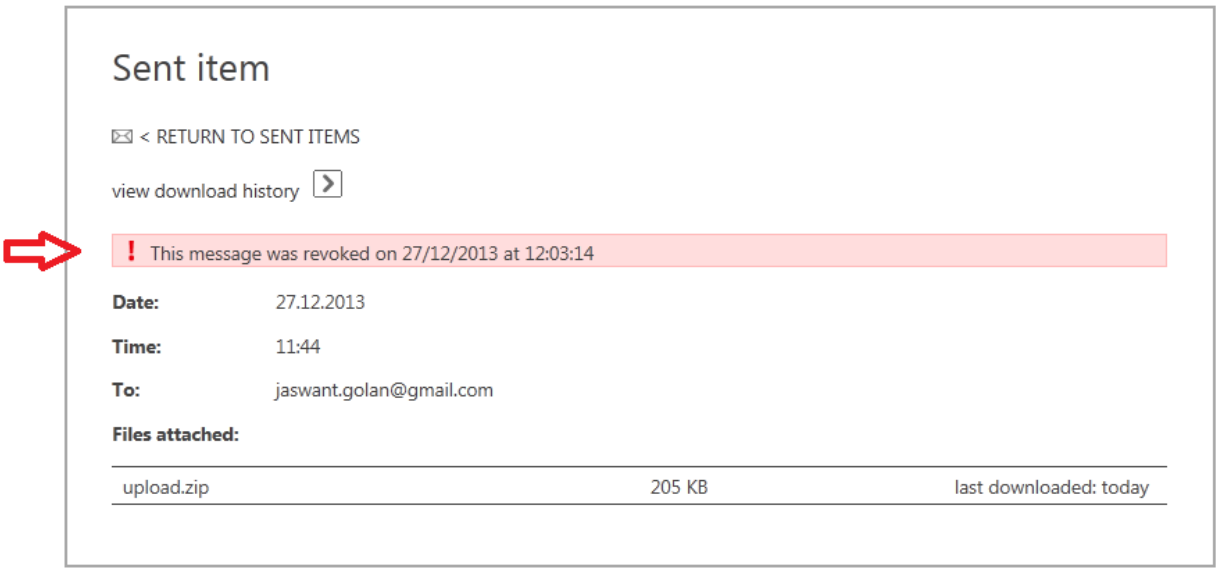
Tick the message/ file that you want to revoke as shown in picture below and click on 'revoke this message'



A pop up box will appear warning you that the recipient will no longer be able to view / download the file.


Sent item
< RETURN TO SENT ITEMS
download selected
revoke this message
Date: 27.12.2013
Time: 11:44
Message from webpage
Revoking a message will delete the message and any attachments. Recipients will not be able to view the message or attachments. Do you want to continue?
OK
Cancel

Click the OK button and the message / file is now revoked and will no longer be available to the recipient.



9. File Waiting Alert Notification.

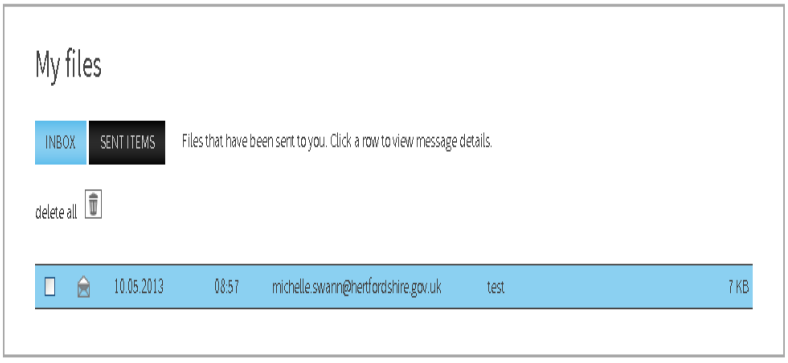
When a file arrives for your attention, you will receive an automated alert email in your normal email address Inbox (which you have registered previously) informing you of the files arrival. To get the file, simply click on the link in the email and login to download the file.

1.3.Downloading Documents (New/Current User)

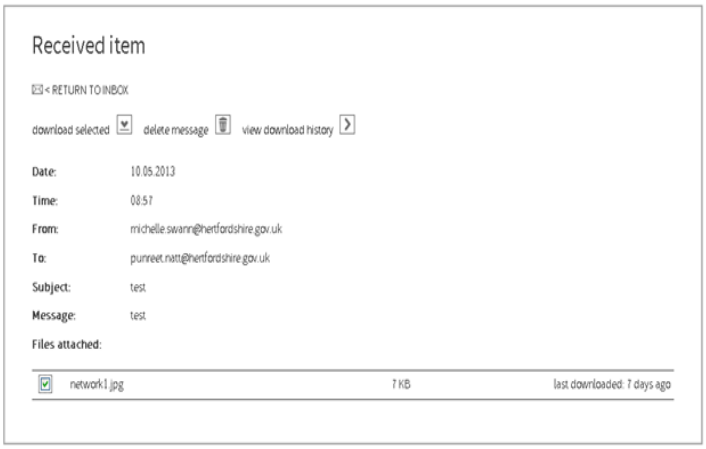
If you are a new user, an automated email will inform you that a file has been sent to you and to prompt you to register. Please proceed with registration as section 3 above.

If you are already registered then login and click on MY FILES and choose INBOX

1. Click on the 'My Files' tab on the home screen to access inbox. Select the message you wish to view/download.



2. The message will open. You will be able to see a short message from the sender and also the attached file. Select the file you wish to download and then click download.



3. A dialogue box will open for you to open or save the document. Select 'SAVE' to save the document to your desired location.

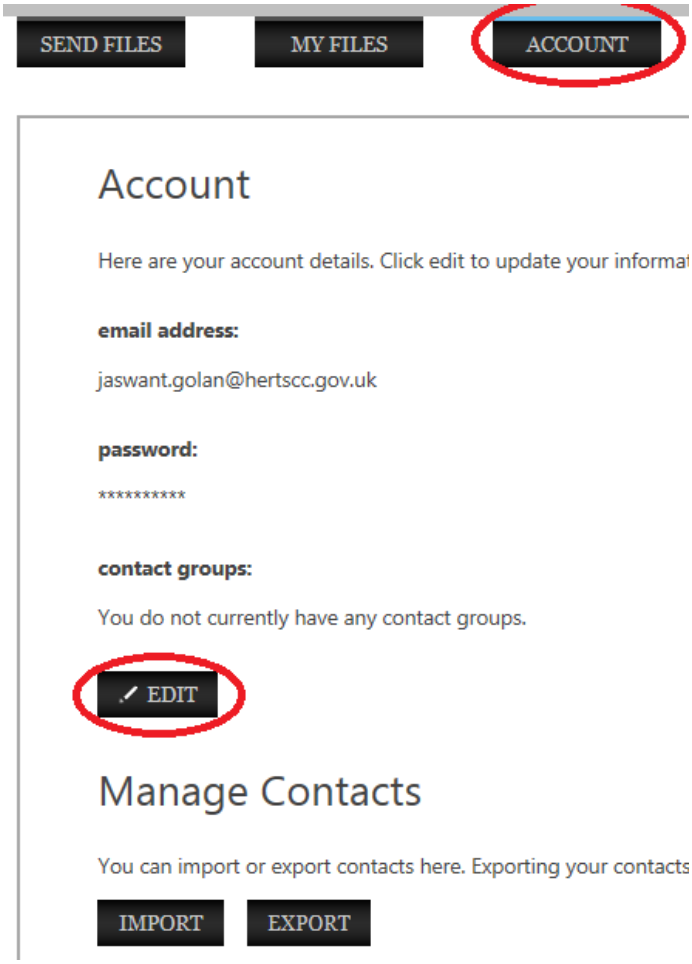
NOTE – You MUST make sure that you have chosen a file storage location that applies the security required for the type of file you are downloading.

10. Address Book Management.

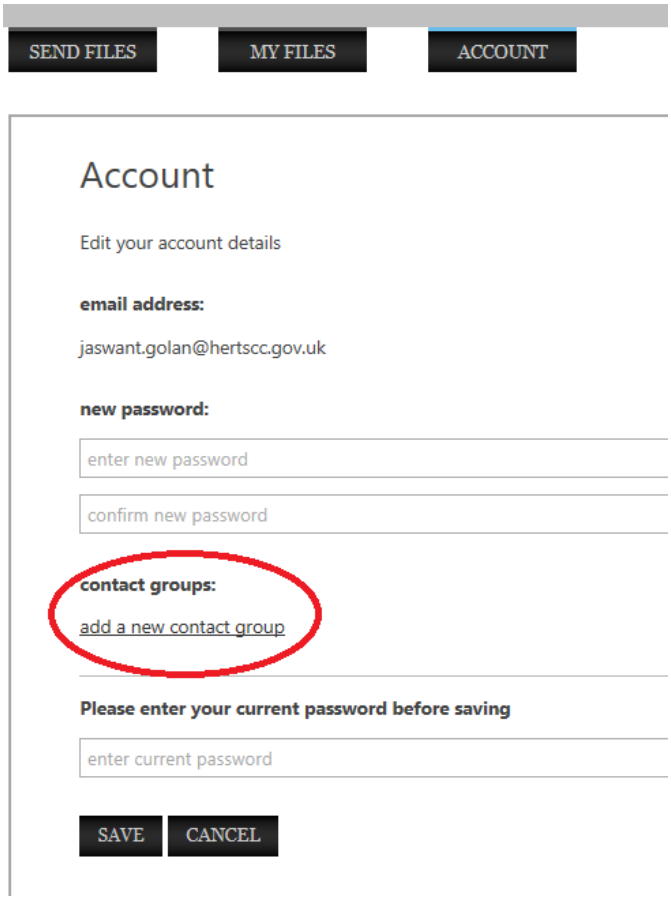
HertSFX provides basic address book management. It keeps a record all the email addresses you have previously used. Once your recipients have confirmed and verified their email addresses, HertSFX gives you an opportunity to organise these recipients into groups.

1.4. Creating a new group of users

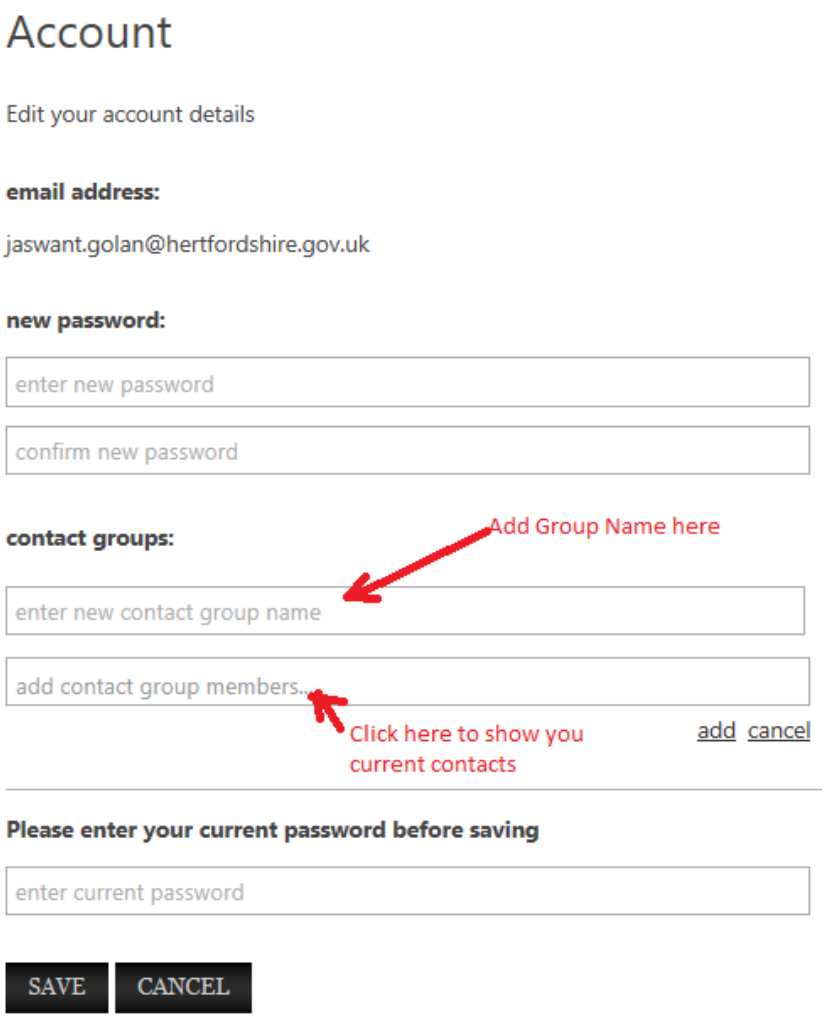
1. Click on your ACCOUNT tab and choose EDIT as shown below.



2. Click on add a new contact group



3. You can now provide a Name for the Group and start adding your contacts. Name your group. Click in the add contact group members and all you contacts who have registered and verified will appear in the dropdown list. You choose the contacts you want added. When finished, supply your current password and click on SAVE. This group will now appear in you drop down list in the send file screen. Select this group name will automatically add all the group members email addresses to the send box.



You may add and take away members of this group by using the edit function. You can remove the whole group is needed. Note you will only remove the group name not the individual members of the group.

1.5.Importing a list of your colleagues contacts

At its simplest level, HertSFX has a facility to 'share' your colleagues list of HertSFX users. It is not true sharing but more a copying into your address book of your colleague's contacts. This facility was added to HertSFX to make it easier for social care teams to use a common list of professional contacts. This facility is called Exporting and Importing contacts.

For importing to succeed, the contacts list MUST consists of people who have previously used HertSFX. If you attempt to import contacts that are not users of HertSFX, it will not be successful.

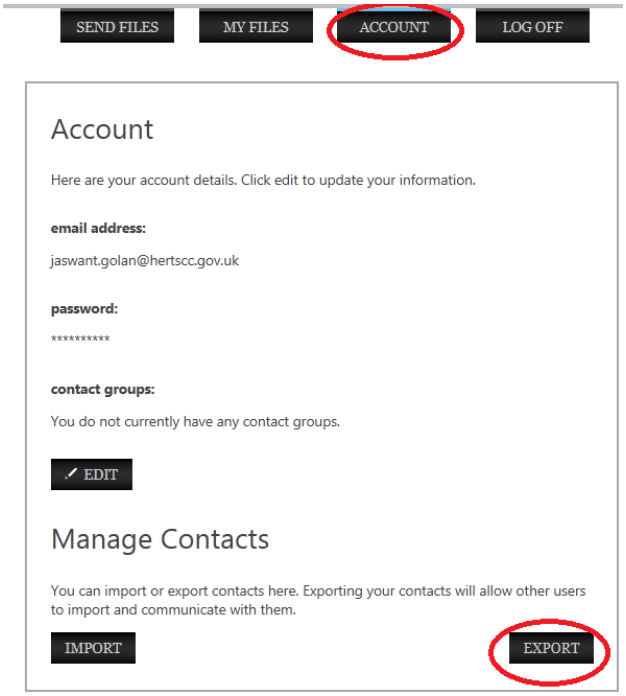
1.6. There are two parts to 'sharing' contact lists

i) EXPORT a list of contacts from HertSFX user A and

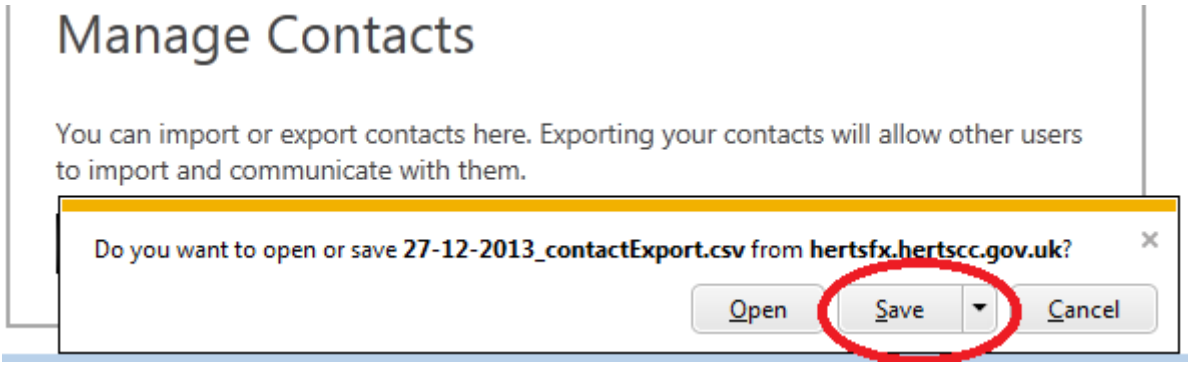
ii) IMPORT that list of contacts into HertSFX user B.

1.7. Exporting a contacts list.

1. Login and Click on your ACCOUNT tab and choose EXPORT as shown below.



2. Choose Save as shown below. Note the name and location you are saving the file to. This file will consist of the list of registered users.


Manage Contacts
You can import or export contacts here. Exporting your contacts will allow other users to import and communicate with them.
Do you want to open or save 27-12-2013_contactExport.csv from hertsfx.hertscc.gov.uk?
Open
Save
Cancel

3. Your may now email this file to your colleague who wants to share the file.

1.8.Importing a contacts list.

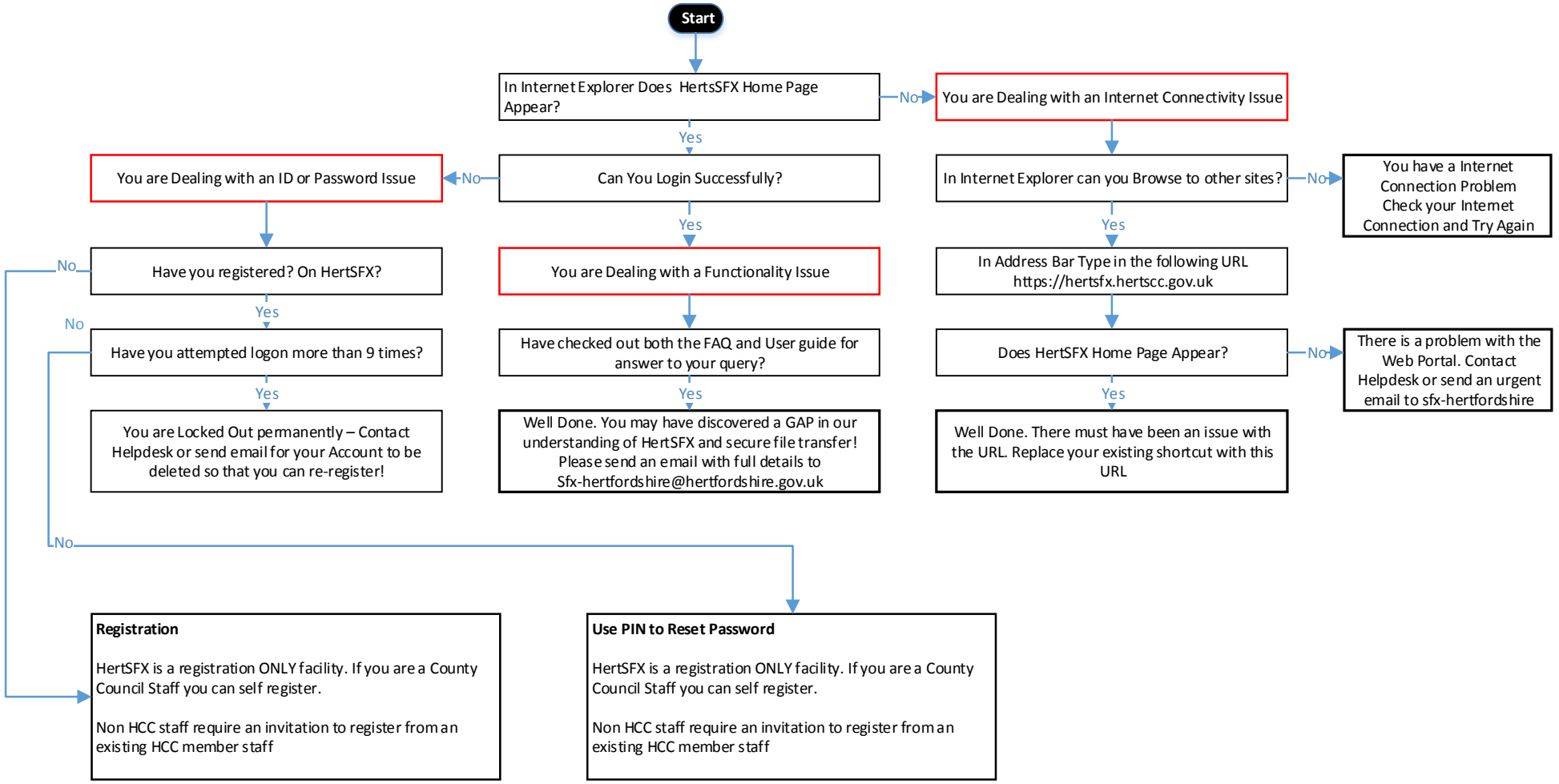
1. Login and Click on your ACCOUNT tab and choose IMPORT.
2. Locate and choose the file your colleague has provided.
3. The system will import the contact list and add to your address book.

11. TROUBLESHOOTING GUIDE

HertSFX is simple file exchange system that enables secure file transfer. It is accessed via an internet browser and uses the sender and receivers email system to convey alerts and notices about secure files awaiting collection. It uses standard internet conventions and principles and does not add or take away any software component to your machines. HertSFX works on the similar principles of popular file exchange and sharing sites on the web BUT within a controlled environment.

The flow chart on the next page gives an overview of the utility and how to diagnose issues with HertSFX.

Trouble Shooting HertSFX V2.2


Start
In Internet Explorer Does HertsSFX Home Page Appear?
No
You are Dealing with an Internet Connectivity Issue
Yes
In Internet Explorer can you Browse to other sites?
No
You have a Internet Connection Problem Check your Internet Connection and Try Again
Yes
In Address Bar Type in the following URL https://hertsfx.hertscc.gov.uk
Does HertSFX Home Page Appear?
No
There is a problem with the Web Portal. Contact Helpdesk or send an urgent email to sfx-hertfordshire
Yes
Well Done. There must have been an issue with the URL. Replace your existing shortcut with this URL
Can You Login Successfully?
No
You are Dealing with an ID or Password Issue
Yes
You are Dealing with a Functionality Issue
Have checked out both the FAQ and User guide for answer to your query?
Yes
Well Done. You may have discovered a GAP in our understanding of HertSFX and secure file transfer! Please send an email with full details to Sfx-hertfordshire@hertfordshire.gov.uk
Have you registered? On HertSFX?
No
Yes
Have you attempted logon more than 9 times?
No
Yes
You are Locked Out permanently – Contact Helpdesk or send email for your Account to be deleted so that you can re-register!
No
Registration
HertSFX is a registration ONLY facility. If you are a County Council Staff you can self register.
Non HCC staff require an invitation to register from an existing HCC member staff
Use PIN to Reset Password
HertSFX is a registration ONLY facility. If you are a County Council Staff you can self register.
Non HCC staff require an invitation to register from an existing HCC member staff